2014 SMARTGRID CYBERSECURITY SURVEY

The smart grid has expanded rapidly over the past few years

but security is a growing concern

HOW BIG OF A PROBLEM IS SECURITY NOW FOR THE SMART GRID?

- 8%
- 32%
- 40%
- 21%

- A small problem
- A moderate problem
- A big problem
- A very big problem
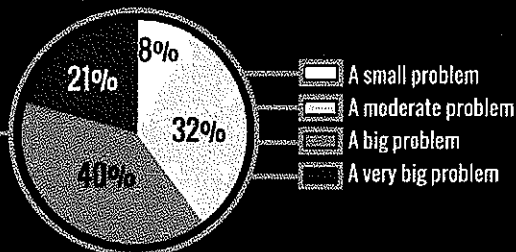
HOW BIG OF A PROBLEM DO YOU BELIEVE SECURITY FOR THE SMART GRID WILL BE IN FIVE YEARS?

- 10%
- 23%
- 37%
- 29%

- A small problem
- A moderate problem
- A big problem
- A very big problem

SMART GRID AREA OF CONCERN RATING*
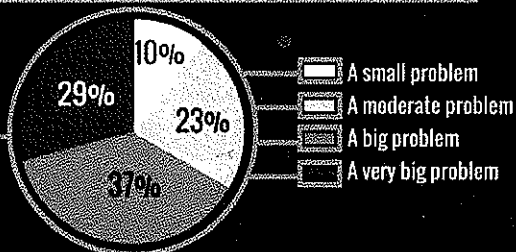
- System failure (outages) 4.6
- Consumer data privacy 3.8
- Energy theft or hacking of smart meters 3.6

CONSEQUENCE SEVERITY OF UTILITY SECURITY BREACH RATING*

- Power outages occur 4.3
- Power flow is disrupted 4.1
- Equipment is damaged 4.0
- Smart meters are hacked 3.5

*Respondents were asked to rate their level of concern and severity on these areas of security using a scale of 1 to 5. With 1 being low concern/low severity and 5 being extremely high concern/extremely high severity.
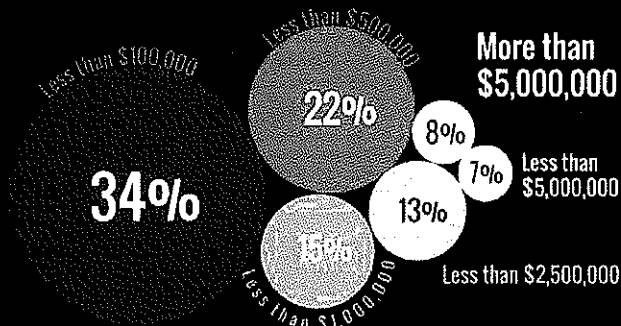
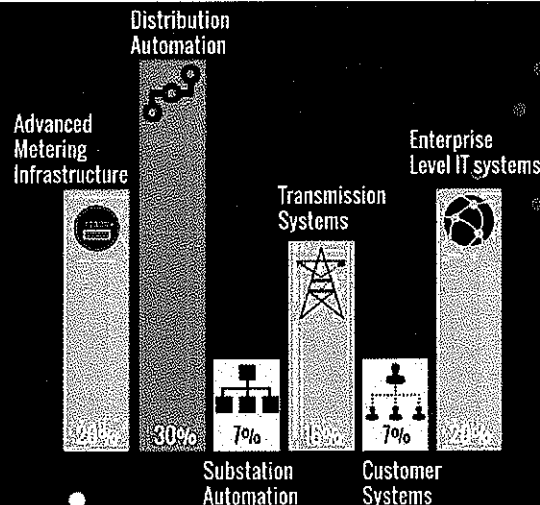## WHAT IS THE BEST WAY TO REMEDY SMART GRID SECURITY CONCERNS?

- 15% Customer demand
- 38% Government standards
- 30% Legal ramifications, penalties
- 11% Incentives (e.g., government grants)
- 6% Public pressure (media attention)
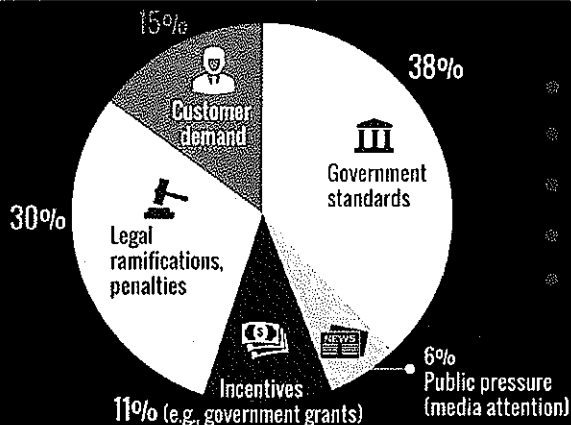
IS GRID PREPARED FOR THE THREATS TO ITS SECURITY?

- 4%
- 13%
- 32%
- 51%

- Yes, well prepared
- Yes, moderately prepared
- Yes, but only slightly prepared
- No, not prepared at all
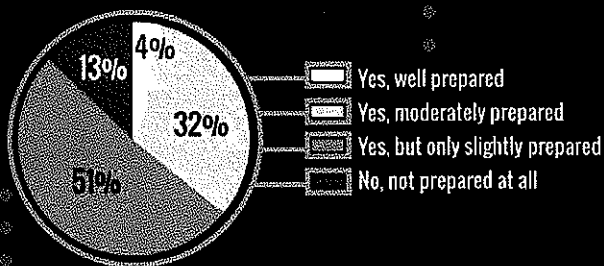
HOW MUCH IS YOUR ORGANIZATION PLANNING TO INVEST IN CYBER SECURITY TECHNOLOGIES OVER THE NEXT YEAR?

- Less than $100,000 — 34%
- Less than $500,000 — 22%
- Less than $1,000,000 — 15%
- Less than $2,500,000 — 13%
- Less than $5,000,000 — 7%
- More than $5,000,000 — 8%

WHAT AREA OF THE GRID WILL THE LARGEST AMOUNT OF INVESTMENT BE MADE OVER THE NEXT YEAR?

- Advanced Metering Infrastructure — 20%
- Distribution Automation — 30%
- Substation Automation — 7%
- Transmission Systems — 19%
- Customer Systems — 7%
- Enterprise Level IT systems — 20%

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